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Belgium-Luxembourg

Fresh Deciduous Fruit

Semi-Annual

2004

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Report Highlights:

Belgium/Luxembourg post-harvest apple production estimates for 2003 show a 10 percent decrease compared to 2002. This decrease is expected to lead to lower exports. Post-harvest pear production estimates for 2003 are almost unchanged from 2002. As a result, little changes are expected in MY 2003 pear consumption and trade.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Semi-Annual Report
The Hague [NL1]
[BE]

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Executive Summary

Post harvest estimates put commercial apple and pear production in 2003 at 319 thousand tons and 174 thousand tons, respectively. Compared to 2002, apple production decreased 10 percent, while pear production increased 1 percent. Frost damage at flowering and summer drought had less of an impact on production than was initially forecast.

While fresh consumption remains stable, lower apple production will lead to lower exports for MY2003. For pears, MY2003 consumption and trade will likely be unchanged.

Apples

Due to frost damage and summer drought, 2003 pre-harvest production forecasts were low. Post-harvest estimates, however, reveal production of 319,000 tons, about 2 percent above the 5-year average. This is 16 percent higher than the pre-harvest estimate, but 10 percent below the 2002 production level.

The 2003 marketing season started slowly compared to 2002, but with average prices rising to more than €300/MT (compared to €250/MT in 2002), apple sales began to pick up by the end of November. Domestic fresh apple consumption is expected to continue its slow, long-term decline. While imports, mainly counter seasonal, are expected to remain stable, lower 2003 production will lead to decreasing exports compared to MY2002.

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Fresh Apples			(HA)(1000 TREES)(MT)		
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	11900	11900	12000	12000	0	10660
Area Harvested	9500	9500	10900	10900	0	9560
Bearing Trees	20000	20000	20000	20000	0	17800
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	20000	20000	20000	20000	0	17800
Commercial Production	340064	340064	348100	348617	0	318900
Non-Comm. Production	3500	3500	3500	4000	0	3200
TOTAL Production	343564	343564	351600	352617	0	322100
TOTAL Imports	236091	232811	240000	257528	0	257000
TOTAL SUPPLY	579655	576375	591600	610145	0	579100
Domestic Fresh Consump	177489	181423	184100	182573	0	179000
Exports, Fresh Only	337609	330395	340000	367238	0	340000
For Processing	64400	64400	65000	60000	0	60000
Withdrawal From Market	157	157	2500	334	0	100
TOTAL UTILIZATION	579655	576375	591600	610145	0	579100

Export Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	Fresh Apples		
Time Period	July-June	Units:	Metric Tons
Exports for:	MY2001		MY2002
U.S.	0	U.S.	0
Others:		Others:	
Germany	132377		170892
Netherlands	70121		80251
Russia	31476		43375
France	40844		27462
United Kingdom	5069		13603
Spain	6664		6576
Sweden	4761		4234
Denmark	2582		3113
Belarus	13279		2501
Total for 'Others'	307173		352007
Others not Listed	23222		15231
Grand Total	330395		367238

Import Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	Fresh Apples		
Time Period	July-June	Units:	Metric Tons
Imports for:	MY2001		MY2002
U.S.	56	U.S.	43
Others:		Others:	
New Zealand	76694		81515
Netherlands	39316		44681
France	46039		45674
Argentina	27758		31140
South Africa	14635		22145
Italy	13476		15431
United Kingdom	2012		3564
Germany	2992		3809
Brazil	5234		2915
Total for 'Others'	228156		250874
Others not Listed	4599		6611
Grand Total	232811		257528

Source: World Trade Atlas

Pears

Post-harvest estimates for 2003 Belgian pear production (of 174,000 tons) were 22 percent above Prognosfruit's pre-harvest forecast. That is about 1 percent above final 2002 production figures and in line with the 5-year average. However, production area increased almost five percent in 2003, and per hectare production is below the 2002 level. November prices were almost equal to 2002 prices, as was sales volume. Domestic consumption is expected to remain stable and MY2003 trade figures are also expected to remain unchanged.

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Fresh Pears			(HA)(1000 TREES)(MT)		
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2001		07/2002		07/2003
Area Planted	7135	7135	7350	7350	0	7760
Area Harvested	6600	6600	6850	6950	0	7360
Bearing Trees	9500	9500	9800	9950	0	10500
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	9500	9500	9800	9950	0	10500
Commercial Production	88676	88676	170985	172640	0	174300
Non-Comm. Production	1000	1000	1200	1200	0	1200
TOTAL Production	89676	89676	172185	173840	0	175500
TOTAL Imports	85766	90134	65000	78412	0	70000
TOTAL SUPPLY	175442	179810	237185	252252	0	245500
Domestic Fresh Consump	40419	49891	45185	49036	0	48500
Exports, Fresh Only	132441	126637	185000	186865	0	185000
For Processing	2300	3000	2500	13000	0	9000
Withdrawal From Market	282	282	4500	3351	0	3000
TOTAL UTILIZATION	175442	179810	237185	252252	0	245500

Export Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	Fresh Pears		
Time Period	July-June	Units:	Metric Tons
Exports for:	MY2001		MY2002
U.S.	0	U.S.	0
Others:		Others:	
Germany	28420		36651
Russia	19898		33273
Netherlands	23052		32733
France	19615		23179
Spain	6314		18279
United Kingdom	9174		16484
Norway	7288		8991
Sweden	3693		3848
Total for 'Others'	117454		173438
Others not Listed	9183		13427
Grand Total	126637		186865

Import Trade Matrix			
Country	Belgium-Luxembourg		
Commodity	Fresh Pears		
Time Period	July-June	Units:	Metric Tons
Imports for:	MY2001		MY2002
U.S.	0	U.S.	91
Others:		Others:	
Argentina	38401		32595
South-Africa	16091		15134
Netherlands	8957		13790
France	11334		9650
Spain	8684		2377
Italy	2855		1089
Total for 'Others'	86322		74635
Others not Listed	3812		3686
Grand Total	90134		78412

Source: World Trade Atlas